



Sauk County How Do I Guide

System Practices

Job Function	County Information
Intake	<ul style="list-style-type: none"> ■ The Information and Referral functionality will not be used. ■ Access will begin the intake in CMHC. Once the intake is transferred from CMHC to WiSACWIS, the pending intake will be accessible on the Intakes tab. ■ When populating the Person Search window, if the person's name is not known, the worker should enter "Unknown" as the First Name and Last Name.
Initial Assessment	<ul style="list-style-type: none"> ■ The Assessment Extension function will not be used.
Court/Out of Home Placement	<ul style="list-style-type: none"> ■ The CPS Placement Request function will not be used.
Case Maintenance	<ul style="list-style-type: none"> ■ Case Notes will be used to document Assessment Contacts and Initial Face-to-Face Contacts.
Financial	<ul style="list-style-type: none"> ■ Title IV-E Eligibility determinations will be performed by Maximus.
Templates	<ul style="list-style-type: none"> ■ When completing work within WiSACWIS access templates prior to approval. Once work is approved, templates that have not been previously accessed for that work cannot be opened. ■ If support staff will be utilized for completing templates, the template should first be created by the worker. Support staff will then access the pending work to complete the template.

Ticklers

Tickler Name	How is it created?	How is it removed?	When does it display on my Ticklers tab?
Assessment Due	When the Protective Services Report is linked to an existing case or used to create a case.	When the supervisor approves the assessment.	The Assessment is due 60 days from the date the PS Report is screened in by the supervisor. This tickler will display on the worker's Tickler tab 30 days before the Date Due.
Case Progress Evaluation	The Case Progress Evaluation tickler is created when the supervisor approves the Case Plan. However dates are set based on the first specific goal entered into the Case Plan.	The tickler is reset, if any specific goals are open, when a Case Progress Evaluation has been completed and has received supervisory approval. The tickler is deleted when the case is closed or transferred to the adoption unit.	The Case Progress Evaluation is due 90 days from the date the first Specific Goal was entered for any case participant on the Case Plan. This tickler will display on the worker's Tickler tab 30 days before the Date Due.
Court Report Due	When a date is entered into the Report Due field on the Legal Status window and the verified checkbox is checked.	When a date is entered in the Report Submitted field on the Legal Status window.	The Court Report is due based on the date entered in the Report Due Date field in the Legal Status window. This tickler will display on the worker's Tickler tab 60 days before the Date Due.
Home License About To Expire	When a home provider license is created.	When the status of the license is changed to Renewed, Revoked, Closed or Expired.	The Home Provider License expiration date is based on the date entered in the Effective To Date on the Home Provider License window. This tickler will display on the worker's Tickler tab 65 days before the expiration date.



WiSACWIS Help Desk (866) 335-2180

WiSACWIS Knowledge Web

http://apps3.dhfs.state.wi.us/wisacwis/knowledge_web/index.htm



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Permanency Plan Due	When an Out of Home Placement is created, a date is entered in the 'Date removed from his or her home' field, and the placement is approved.	This tickler can be deleted: when a permanency plan has received supervisory approval; the Out of Home Placement is ended and the 'Discharge Reason' field completed; or the Out of Home Placement is ended with reason 'Placement made in error.'	The Permanency Plan is due 60 days from the child's initial placement date. This tickler will display on the worker's Tickler tab 14 days before the Date Due.
Permanency Plan Review	When an Out of Home Placement is created, a date is entered in the 'Date removed from his or her home' field, and the placement is approved.	<p>When an Administrative Review Meeting is scheduled and the Meeting Completed checkbox is checked, the tickler is reset for one year from the date of the Administrative Review meeting. When a Legal Status with a legal action of 'Permanency Plan Review (6 months)', and Hearing Date is entered, and the verified checkbox is checked, the tickler is reset for one year from the Hearing Date. When a Legal Status with a legal action of 'Permanency Plan Hearing (annual)', a Hearing date is entered, and the verified checkbox is checked, the tickler is reset to the earliest of three dates. Either one year from the Date of the Administrative Review meeting completed; one year from the date entered into the Hearing Date field on the Legal Status window with the action value of Permanency Plan Review (6 months); or six months from the date entered into the "Hearing Date" field on the Legal Status window where the Legal Action is 'Permanency Plan Hearing (annual)' and the verified checkbox is checked.</p> <p>The original tickler is deleted, and NO new tickler is created when: the Out of Home Placement is ended the 'Discharge Reason' field is completed; or the Out of Home Placement is ended with reason: 'Placement made in error.'</p>	The Permanency Plan Review is due 6 months from the date the Out of Home Placement with a date entered in the 'Date removed from his or her home' field is approved. This tickler will display on the worker's Tickler tab 60 days before the Date Due.
Permanency Plan Hearing	When an Out of Home Placement is created, a date is entered in the 'Date removed from his or her home' field, and the placement is approved.	<p>When an Administrative Review Meeting is scheduled, and the Meeting Completed checkbox is checked; or a Legal Status with a legal action of 'Permanency Plan Review (6 months)', and Hearing Date is entered, and the verified checkbox is checked, the tickler will be reset to the earliest of three dates. Either six months from Administrative Review meeting date; or six months from Hearing date on the Legal Status; or one year from the 'Date removed from his or her home' field on the Out of Home Placement for the first tickler created. When a Legal Status with a legal action of 'Permanency Plan Hearing (annual)' is entered, a Hearing date is entered, and the verified checkbox is checked, the tickler is reset for one year from the date entered in the Hearing Date field.</p> <p>The original tickler is deleted, and NO new tickler is created when: the Out of Home Placement is ended and the 'Discharge Reason' field is completed; or the Out of Home Placement is ended with reason: 'Placement made in error.'</p>	The Permanency Plan Hearing is due 1 year from the date the Out of Home Placement with a date entered in the 'Date removed from his or her home' field is approved. This tickler will display on the worker's Tickler tab 60 days before the Date Due.



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